



2021-22 Strategic Plan

Donor Relations

UVU unit strategic planning is designed to promote organizational excellence and continuous improvement. Successful fulfillment of the unit mission is the goal. It is accomplished by accomplishing and assessing unit objectives. Key assessment findings form the basis for a Quality Improvement Focus, with resource reallocation and PBA requests supporting the QIF.

1. UNITS INCLUDED

Each unit of the university is strongly encouraged to maintain their own strategic plan. Units led by executives are required to have a plan. Executives' plans may be unified, encompassing all units reporting to them, or they may be federated, requiring that units reporting to them maintain their own plans separately. The latter is the preferred planning model, but the former may be used where closer coordination of offices is needed. Units that do not have their own plans must be addressed in the parent unit's plans.

Institutional Advancement, Strategic Engagement, Donor Relations

2. MISSION FULFILLMENT

Unit Mission Statement: Donor Relations works to retain new and lifelong donors through donor acknowledgement, stewardship, recognition, and engagement, creating enduring and meaningful philanthropic relationships between donors and UVU.

Objectives

Objective Name: Clearly Define Donor Relations Mission

Objective: Donor Relation's first objective is to clearly define our mission and strategy, in order to lead our department in a clear direction. We will focus on aligning it with Strategic Engagement's mission, which will support Institutional Advancement's overall vision and mission.

Supported UVU Objectives:

Click to select one primary objective and, optionally, up to two additional objectives.

- Primary Objective (required) Achieve 3: Employment and Further Education
- Additional Objective (optional): Include 2: Access and Equity
- Additional Objective (optional): Engage 3: Employee Engagement

Objective Name: Establishing Donor Relation's Key Performance Indicators (KPI's)

Objective: Donor Relation's second objective is to create and establish weekly, quarterly, and yearly key performance indicators in the form of a dashboard, solidifying a baseline program evaluation and accountability. The overall goal is to create a unifying donor relations team with all of institutional advancement strategic engagement teams, focusing on donor stewardship, retention, and financial support to the university.

Supported UVU Objectives:

Click to select one primary objective and, optionally, up to two additional objectives.

- Primary Objective (required) Engage 3: Employee Engagement
- Additional Objective (optional): Include 2: Access and Equity
- Additional Objective (optional): Achieve 3: Employment and Further Education

Objective Name: Donor Relations Cycle of Success

Objective: Donor Relations will communicate as necessary donor relations cycle of success and clearly define donor relations role in engaging and stewarding donors. Collaboration with other teams across institutional advancement will be essential to accomplishing this and solidifying donor relation's responsibilities to bringing campaign success.

Supported UVU Objectives:

Click to select one primary objective and, optionally, up to two additional objectives.

- Primary Objective (required) Achieve 3: Employment and Further Education
- Additional Objective (optional): Engage 2: Outreach
- Additional Objective (optional): Include 2: Access and Equity

Objective Name: Increase UVU's Donor Retention Rate

Objective: Donor Relations will provide expertise and assist leading strategy and execution for increasing donor retention and engagement by 18.5% during the next 3 years. This will be accomplished through following the donor relations cycle of success (outlined below) and collaborating with Institutional Advancement Directors of Development team.

1. *Acknowledge all donors, increase donor retention and satisfaction to increasing the philanthropic success at UVU, which in turn will give more opportunities for students to succeed in work and life.*
2. *Stewarding donors at all levels, from Annual Giving to President's Emerald Society by demonstrating the value of their gift through a system of reporting.*
3. *Recognizing donors at appropriate events, with meaningful giving societies, appropriate public displays, and celebrating key milestones based on the donor's giving behavior.*
4. *Engaging donors in meaningful experiences and events that allow the donor to become emotionally invested and committed to UVU. The team will focus on experiences, not stuff.*
5. *Continuously create a call-to-action and evaluate the impact each of these have on donor engagement and retention.*

Supported UVU Objectives:

Click to select one primary objective and, optionally, up to two additional objectives.

- Primary Objective (required) Include 2: Access and Equity
- Additional Objective (optional): Engage 2: Outreach
- Additional Objective (optional): Achieve 3: Employment and Further Education

Vision 2030

Describe how your unit mission and objectives support UVU Vision 2030 (see <https://www.uvu.edu/vision2030/>):

UVU's Donor Relation and Annual Giving team supports and implements the Vision 2030 by doing the following:

- Achieve Strategy 1, Initiative B: Working to keep and secure donations to help, “pay for college, supporting family...” This will be done by stewarding and retaining donors to the University. This includes acknowledging, stewarding, recognizing, and engaging donors with a continuum of support.
- Achieve Strategy 1, Initiative D: Donor Relations has and will continue to use “Search Advocacy,” as the standard for hiring all positions.
- Include Strategy 2, Initiative A: Donor Relations will support the development of a, “multi-campus plan that supports improved access, flexibility and affordability.” This will be done by stewarding and retaining donors to the University.
- Include Strategy 2, Initiative C: Donor Relations will work to, “strengthen outreach and support of underrepresented populations” by actively stewarding donors and the funds donated to support programs and initiatives outlined in UVU’s Inclusion plan. Will also create 1-2 donor affinity groups and supportive communities for underserved populations. Additional support and collaboration will be offered to Directors of Development for the First Generation Initiative.
- Include Strategy 2, Initiative D: Donor Relations will work to assist in maintaining low tuition and fee rates by being fiscally prudent and manage finances within the department so that limited endowment funds will be used for reducing student financial burdens.
- Engage Strategy 3, Initiative D: Donor Relations will work to improve industry partnerships by demonstrating the impact of their giving with impact reporting, fund stewardship, and donor engagement.

3. ASSESSMENT OF OBJECTIVES

Key Performance Indicators

Identify meaningful, assessable, and verifiable key performance indicators that demonstrate achievement of objectives and a benchmark level of the indicator that demonstrates achievement of the objective for each indicator. Indicators are formally defined beforehand and based on regularly and systematically collected information. They may be quantitative or qualitative and direct or indirect as appropriate to the objective.

Provide the following information in the Assessment section. Complete the section below for each assessment indicator.

- **KPI Metric Name.** *Provide a short descriptive name for reference use.*
- **KPI Metric Description.** *Describe the data to be collected and the method of collecting it. This is simply a description of methodology; the actual results should be described in the results field below.*

- **KPI Benchmark.** Describe what values of this indicator constitute acceptable achievement of the objective.
- **Related Objectives.** Identify the unit objectives that the indicator assesses.
- **Most Recent Data Date.** Identify the date of the most recently provided data. If an indicator is not being assessed in the current year as part of a multi-year rotation of assessments, the data date should note the next scheduled collection year as well.
- **Results.** Provide the data collected for the indicator, preferably a multi-year history. Results should show the most recently collected data even if it was not collected in the current year.

Repeat this section as necessary by copying and pasting for each KPI.

Results for each KPI should be updated annually; if data was not collected this year, state that and include the most recent year's data. The KPIs and benchmarks should be revised if the unit objectives change, the unit determines that the KPI does not appropriately measure achievement of the objective, or the unit determines that the benchmark imposes an inappropriate standard of success.

KPI Metric Name: Increase UVU's Donor Retention Rate by 18.5% during 3 years

KPI Metric Description: Donor Retention Rate consists of the percentage of donors that continue to give each year to UVU, remaining engaged through philanthropic giving. Found through taking the number of donors in the previous fiscal year, and dividing it from the number of donors retained.

KPI Benchmark(s): Increase donor retention rate by 18.5% during 3 years

Related Objectives: Increasing UVU's Donor Retention Rate

Most Recent Data Date: September 2021

Results: Retention Rate from FY17 = 44.76%; FY18 = 44.99%; FY19 = 44.74%; FY20 = 29.27%; FY21 = 41.81%. As evaluated, Utah Valley University's donor retention rate has stayed around an average of 44% (except for the 29%, impacted greatly from Covid effects). This donor retention rate is 10% below the national average of donor retention at public universities, which sits around 55.9% (Blackbaud metrics, 2019). Donor Relation's goal is to increase our average by 20% during the next 3 years through following the donor relations cycle of success (outlined above in 'objectives') and collaborating with Institutional Advancement Directors of Development team.

KPI Metric Name: Donor Stewardship and Communications

KPI Metric Description: Document & increase the number of donor stewardship interactions and reports sent out to, demonstrating donor care and transparency.

KPI Benchmark(s): Increasing the number of stewardship strategies for top tiered donors. Increase the number of reports sent out to donors each year, ensuring all donors receive a yearly report of donor impact, regardless of level of giving. Specify report according to level of giving.

Related Objectives: Establishing Donor Relation's KPI's; Donor Relations Cycle of Success; Increase UVU's donor retention rate

Most Recent Data Date: July 2021 (reports), N/A (donor satisfaction)

Results: Donor Relations will create a tier system of stewardship and communication through the following:

- 1) Donor Direct – creation and execution of stewardship strategies for Institutional Advancement (IA) team member to donor. Currently there are no set stewardship strategies for tiered donors.
- 2) Specialized communication pieces - Document the number of reports sent out to donors, increasing transparency of the impact donor's dollars are having. Currently, we are sending out 330 reports each year, when we have over 3,000 donors giving.
- 3) Communication generalized to all donors - Our goal is to create full transparency to all donors that give to UVU, sending general reports demonstrating donor dollar impact

Each of these will KPI's will show the exception care we give to donors, exceptional accountability on showing the impact of our work through reports and stewarding donors, and exceptional results through increasing our donor satisfaction and retention.

KPI Metric Name: Donor Engagement

KPI Metric Description: Increase the number and strategy of engagement opportunities through giving societies, events, board involvement, and donor satisfaction

KPI Benchmark(s): Donor surveys will be utilized to communicate and evaluate donor satisfaction. Donor survey will include questions that focus on donors feeling appreciated, recognized, and engaged, speaking towards the impact of the donor cycle of success. Events – donor focus attendance and evaluating who is coming, who isn't, how we can increase engagement to continue moving the donor through the success cycle.

Related Objectives: Establishing Donor Relation's KPI's; Donor Relations Cycle of Success; Increase UVU's donor retention rate

Most Recent Data Date: N/A

Results: Increasing the opportunities all donors are given to be engaged at UVU, through events, boards, and societies. Collaboration will occur between other IA team members in striving to create these opportunities. Evaluation will be driven through donor satisfaction surveys and attendance at various engagement occasions. These will each result in successfully retaining donors and increasing philanthropic interest and donations.

4. CRITICAL ASSESSMENT FINDINGS

Primary Findings

The challenge and opportunity we have been tasked with is to rebuild a scalable, consistent form of donor relations, meeting the University's need of exceptional care, exceptional results, and exceptional accountability to our donors.

Objective Name: Establishing Donor Relation's Key Performance Indicators (KPI's)

Findings: Donor Relations doesn't have any previous KPI's to represent the successes and the changes necessary in building a successful program.

- *Success:* Understand our donor retention rate better and where we need to move towards
- *Opportunities/Challenges:* Since KPI's haven't been gathered, we can start with a clean slate in building-up donor relations, showing our clear impact on fundraising at UVU
- *Effects on organization excellence:* Without KPI's, we are unable to determine where we are bringing the greatest impact, where to improve, and resources required

Objective Name: Donor Relations Cycle of Success

Findings: During the past 4-years, UVU's donor relations functions was decentralized and shared among many different roles within the division. From receipting and acknowledgement letters to impact reports and donor engagement events many of these functions have continued, however without being scalable or consistent for all donors. Since then, we have developed a system of acknowledging donors with new receipts and thank you letters, increasing the impact of communication with donors. Now we are revitalizing and streamlining the reporting process to best steward all our donors, ensuring that each receives a report for transparency of their dollar

impact. We are continuing to follow the Donor Relations Cycle of Success, completing each part of the cycle.

- *Success:* Initiating new gift receipts and acknowledgment thank-you letters; sending them to donors within 24 hours of giving, and a week for the letters; finding the gaps within reporting and researching to implement solutions; created a policy for recognizing donors to be streamlined and utilized across campus
- *Opportunities/Challenges:* We are still facing gaps within stewardship and recognition that we need to address and resolve
- *Effects on organization excellence:* Without all the pieces of the Donor Relations Cycle of Success functioning accordingly, we are missing out on increasing donor affinity to UVU and showing exceptional care and exceptional results in what we do

Objective Name: Increase UVU's Donor Retention Rate

Findings: UVU's donor retention rate has either decreased or stayed consistent during the past 4 years, sitting about 10% below national average. We need to increase the retention rate, as that will mean that we are providing exceptional care to our donors, they are wanting to stay and give to provide funding for students and the University.

- *Success:* After covid, we bounced back to a 10% below national average of donor retention, after being almost 30% below it the previous year
- *Opportunities/Challenges:* We are a small shop within donor relations, but with a large demographic to serve. Finding ways to streamline the specialized processes that help to increase donor retention to fit our resources will be a challenge and opportunity
- *Effects on organization excellence:* If our donor retention rate remains the same or decreases over time, then we are losing donors, which in turn means we will decrease in our ability to fund scholarships, buildings, programs, and other areas of need across the University. Increasing the donor retention rate then infers that we will continue to increase in funding and resources to help students excel and obtain better education

Assessment Ratings

Objective Establishing Donor Relation's Key Performance Indicators (KPI's) Rating: Unsatisfactory

Objective Donor Relations Cycle of Success Rating: Unsatisfactory

Objective Increase UVU's Donor Retention Rate Rating: Unsatisfactory

5. QUALITY IMPROVEMENT FOCUS

Units should develop significant initiatives for improving organizational excellence based on assessment findings. The Quality Improvement Focus initiatives are developed in response to key challenges or opportunities identified through the unit's assessment processes. They support achievement of organizational excellence. Quality improvement can be pursued in a variety of areas such as leadership, work process, responding to growth needs, student learning outcomes, resource efficiency, and other areas for improvement. Units are encouraged to focus on a single initiative and should not attempt more than three quality improvement initiatives at the same time.

Provide the following information in the Quality Improvement Focus Initiatives section. Complete the section below for each unit initiative.

- **Quality Improvement Focus Initiative Name.** *Provide a short descriptive name for reference.*
- **Problem Statement.** *Describe the challenge to be met or opportunity to be pursued as identified in the unit assessment process.*
- **Initiative Description.** *Describe the initiative in detail including the goals and expected outcomes of the initiative.*
- **SMART Goals.** *Describe the goals the unit will pursue through the initiative. Goals for quality improvement initiatives are most likely to be achieved when they are "SMART": Specific, Measurable (quantitatively or qualitatively), Actionable, Realistic, and Timely.*
- **Initiative Begin Year.** *Identify the academic or fiscal year (as appropriate to the unit) in which work will begin on the initiative.*
- **Expected Initiative Completion Year.** *Identify the academic or fiscal year (as appropriate to the unit) in which the initiative is expected to be concluded.*
- **Action to Date.** *Describe actions taken in support of this initiative so far, including actions in previous years.*
- **Impact.** *Describe the effects that the initiative has had so far on organizational excellence.*

Repeat this section as necessary by copying and pasting for each initiative.

Action to Date and Impact should be updated annually. Other parts of this section may be revised when a quality improvement focus is modified, added, completed, or terminated in response to current assessment findings.

Quality Improvement Focus Name: Filling the gaps found within the Donor Relations Cycle of Success

Problem Statement: Evaluating the Donor Relations Cycle of Success and where the gaps are, we are missing opportunities on giving donor's exceptional care through acknowledging, stewarding, and recognizing their giving to UVU.

Initiative Description: Create strategy specific to UVU's donor needs within each of the steps of the Donor Relations Cycle of Success. Implement and then re-evaluate processes and needs. Expected outcome is that donor's will increase their affinity and giving with UVU, thus increasing the funds available for student and University success and growth.

SMART Goals:

- Within the first 3 months, donor relations will finalize a strategy for the gaps in the cycle, prioritizing action on where greatest impact and results lie.
- Within the next 6-12 months, donor relations will take the priority within the cycle (acknowledgment, stewardship, recognition, engagement, etc.) and fully implement strategy.
- Evaluation will continue as strategy is implemented, adjusting as necessary

*This process will continue each year until all gaps are filled

Initiative Begin Year: end of FY 2021

Expected Initiative Completion Year: FY25 - 26

Action to Date: The past 2 years, donor relations has been researching and gathering data to evaluate where donor relations at UVU currently is, and how we can move forward. Gaps were found in the foundation of the acknowledgment process, so solutions were found and implemented. Evaluations continued through the stewardship and recognition process, plans were created and beginning to be implemented. Donor relations is still needing to re-evaluate the processes that have been put in place, determining impact and results of the changes and additions.

Impact: Since implementation of the new acknowledgment process, donors have expressed feeling more appreciated and connected to the University. Prior to the donor relations team being re-created, many donors complained that they never heard from UVU once they gave. Having these processes in place is beginning to allow for all donors to hear from us as soon as they give. Our goal to share our gratitude for all the generous donors, is beginning to shine through our processes.

6. CURRENT RESOURCES

Implementation of the Quality Improvement Focus should first consider existing resources. Provide the following information on budget and number of employees. Current/capital/travel budget subcategories are not provided in Banner and must be calculated by the unit. Add additional table rows for other expenses. The miscellaneous current/capital/travel expense and miscellaneous non-appropriated budget categories should not exceed 10% of these budget categories.

This section should be updated annually.

Budget

	Current Year	Previous Year
Appropriated		
Salaries		
Hourly		
Benefits		
Current/Capital/Travel		
Travel		\$0
Instruction		
Computers and Software		
Other (Describe)		
Misc. (< 10% of Budget)		
Total Current/Capital/Travel		
Total Appropriated	Included on another report	Included on another report
Non-Appropriated		
Other (Current/Capital/Travel for Y20133)	\$38,820.00	\$26,820.00
Misc. (< 10% of Budget)		
Total Non-Appropriated	\$38,820.00	\$26,820.00

Expenditures

	Current Year	Previous Year
Current/Capital/Travel		
Travel		\$390.81
Instruction		\$3,064.76
Computers and Software		\$1,588.61
Other (Describe)		
Misc. (< 10% of Budget)		
Total Current/Capital/Travel	\$0	\$5,044.18
Non-Appropriated		

	Current Year	Previous Year
Other (Hourly, Benefits, Luncheons, Clothing/Uniform, Awards and Gifts, Office Supplies, etc.)	\$1,582.64	\$20,045.48
Misc. (< 10% of Budget)		
Total Non-Appropriated	\$1,582.64	\$25,089.66

Number of Employees

	Current Year	Previous Year
Full-Time		
Executives	1	1
Faculty	0	0
Exempt Staff	2	1
Non-Exempt Staff	0	1
Total Full-Time Employees	3	3
Total Hourly Employees		

7. EFFICIENCIES, REALLOCATIONS, AND REVENUE GENERATION

The efficiency component promotes resource efficiency through expense management, minimizing direct costs to students, and generating resources; directs resource efficiencies toward supporting affordability for UVU students and their families; and ensures that resource efficiencies are consistent with the mission and action commitments, particularly upholding UVU's commitment to access and quality.

Provide the following information in the efficiencies section.

- **Action Name.** Provide a brief descriptive name for reference.
- **Action Description.** Describe the action taken to enhance affordability and efficient use of resources in summary.
- **Amount of Savings/Revenue.** State the total annual savings or revenue from the action. If savings is per-student, estimate the number of students affected and multiply by per-student savings to provide an annual amount.
- **Savings/Revenue Type.** Identify if the savings or revenue generated is ongoing or one-time and appropriated or non-appropriated. Revenue generation is always non-appropriated.

Efficiencies and new revenue reported in the Affordability and Efficiency section may be used to offset needs for additional resources before seeking resources through the PBA process.

Repeat this section as necessary by copying and pasting for each savings action.

This section should be updated annually.

Title: Donor gift giving process

Description: As a way to save money and reallocate it, we have created an internal gift giving system for our donors. The process consists of Donor Relations purchasing gift items for other team members to give to donors (as a way of thanking them). A transfer of money will occur once the gift has been given, moving the money from another index in the division to ours. It has become a strong resource and way to reallocate the expenditures on gifts, allowing us to utilize the money in a strategic way.

Amount of Savings/Revenue (Annually): \$5,000+

Savings Type: Ongoing Non-Appropriated

8. EXPECTED PBA REQUESTS

This information is for preliminary planning of the Quality Improvement Focus and may be revised when submitted to the PBA system. These sections should conform to the PBA request standards. Requests will be submitted in detail through the PBA system.

Repeat this section as necessary by copying and pasting for each anticipated request.

This section should be updated annually.

Request: Donor Relations Coordinator

Rationale: Donor relations requires extensive coordination with vendors for signage, putting together reports for stewardship, buying gifts for donors to assist in engagement, and inputting actions into the database for documentation. Having a coordinator that can accomplish these coordinator responsibilities will allow for the Sr. Director, Director, and Assistant Director of Donor Relations to maintain high level project management, coordinating strategy across the division, and building of relationships with our donors.

Expected Outcomes: Increasing the bandwidth of leaders within Donor Relations, allowing them to focus on the greater needs that will help increase donor affinity and giving to UVU.

Expected Amounts Requested

- Ongoing Appropriated: \$42,565 + benefits (pay grade 16 – class code 5900)

- One-Time Appropriated:
- Ongoing Non-appropriated:
- One-Time Non-appropriated:

Recommended Funding Source: Growth Funding

9. ANNUAL REVISION

Strategic Plans should not be re-written annually; they should build on the previous years' work to fulfill an ongoing mission and achieve long-term objectives. The mission and objectives should be reviewed periodically—less often than annually—but should only change when the unit's purpose or responsibilities substantively change. Similarly, KPIs are most useful if they are used on a long-term basis, so they should not be revised unless they are not providing meaningful, assessable, and verifiable data. Annual revision should focus on assessment results, implementation of the quality improvement focus, and resources.

The following table summarizes the typical revision schedule for strategic plans.

Plan Section	Revise Annually	Revise Only as Needed	Revise Rarely
Units Included			Included Units
Mission			Mission
Objectives		Vision 2030 Support	Objectives
Assessment of Objectives	KPI Data Date KPI Results	KPI Descriptions KPI Benchmarks Other Assessments	
Critical Assessment Findings	Primary Findings Assessment Ratings		
Quality Improvement Focus	QIF Action to Date QIF Impact	QIF Name QIF Problem Statement QIF Initiative Description QIF SMART Goals QIF Dates	

Plan Section	Revise Annually	Revise Only as Needed	Revise Rarely
Current Resources	Current Resources		
Efficiencies, Reallocations, and Revenue Generation	Efficiencies, Reallocations, and Revenue Generation		
Expected PBA Requests	Expected PBA Requests		

10. STRATEGIC PLAN REPORTING FORM

An online reporting form must be completed along with the strategic plan form. It includes basic information about the plan that is needed to support PBA requests, demonstrate fiscal responsibility to the Utah System of Higher Education and state legislators, and comply with accreditation standards. All content for this form can be copied and pasted from the corresponding fields in the strategic plan. A link to the form is available on the UPE web site.
